

INVESTIGATOR'S REPORT

YOU CAN USE THIS PACKET IF ALL THIS IS TRUE:

- The court appointed you investigator in a guardianship and/or conservatorship case.

INSTRUCTIONS

Read all forms and instructions before starting. Fill out forms by typing or printing in blue ink. By “ward”, this packet means a proposed or actual ward or protected person.

The court may appoint an investigator to investigate the appropriateness of 1) appointing, 2) removing, or 3) accepting the resignation of a guardian and/or conservator of an adult or 4) terminating the guardianship and/or conservatorship. The investigator shall have no personal interest in the proceeding. At the hearing, the ward is entitled to cross-examine the investigator. The ward in a conservatorship case is entitled to see all evidence bearing on their condition.

The investigator also shall arrange to transport the ward as the court directs.

STEP 1: CONDUCT THE INVESTIGATION

- (1) Interview the ward.
- (2) Interview the guardian and/or conservator.
- (3) Visit the ward’s current place of residence.
- (4) Visit the ward’s proposed place of residence.
- (5) Interview caregivers and the manager or administrator at the nursing or care home, if any.

In conducting interviews, you may examine any relevant court, medical, or financial record.

STEP 2: FILL OUT THE REPORT OF THE COURT-APPOINTED INVESTIGATOR

- (1) Enter your name, address, and phone number.
- (2) Enter the ward’s name as it appears on the order appointing you.
- (3) Enter the case number as it appears on the order appointing you.
- (4) Check the box indicating which action the report concerns, and list the documents you reviewed and the people you interviewed.
- (5) Check the box indicating where the ward lives. If you check “other”, explain. Enter how long the ward has lived there. Enter where the ward lived before now and when they lived there.
- (6) Describe the symptoms of the ward’s incapacity.
- (7) Enter the guardian and/or conservator’s relationship to the ward.
- (8) Enter the approximate date the ward became incapacitated.
- (9) Describe how the ward’s incapacity is being treated.
- (10) For each prior psychological investigation of the ward, list who conducted the investigation and when and describe their major findings.
- (11) Check each box indicating how the ward’s incapacity limits them, and list any other limitations.
- (12) Describe how the guardian and/or conservator plans to meet the ward’s needs.
- (13) Describe the ward’s opinion and understanding of their incapacity, of the guardian and/or conservator, and of the guardianship and/or conservatorship.

- (14) Describe whether and how the guardianship and/or conservatorship is in the ward's best interest.
- (15) Describe whether the guardian and/or conservator is the most appropriate guardian and/or conservator for the ward.
- (16) Describe whether and how the ward's current and proposed places of residence are in their best interest.
- (17) If the guardianship could be limited, describe how.
- (18) Describe considerations on whether the court should suspend the ward's driver's license.
- (19) Describe whether and how any of the ward's accounts should be restricted. Identify accounts to be restricted by the bank or institution name, an account description (such as "savings", "checking", "money market", etc.), and the value.
- (20) Enter the ward's annual income and total assets listed on the most recent Inventory of Estate, Guardian's Report, or Conservator's Accounting in the case file.
- (21) Enter the ward's diagnosis. If it is progressive and incurable, check the box. List the ward's medications and their purposes.
- (22) Enter any other comments.
- (23) Read the Report and make sure everything in it is true. Date and sign.

STEP 3: FILE THE REPORT WITH THE COURT

At least one week before the hearing date listed on the order appointing you, take or mail the original and one copy of the Report to the Clerk of Superior Court, 200 N. San Francisco St., Flagstaff, AZ 86001. The Clerk will stamp your copy with the filing date and return it you. If you file by mail, include a self-addressed, stamped envelope and a note asking the Clerk to return the copy.

STEP 4: DELIVER THE REPORT TO THE WARD'S ATTORNEY

On the day you file it, mail or hand-deliver a copy of the Report to the ward's attorney (deliver it to the ward if the ward doesn't have an attorney).

(1) Person Filing: _____
Street Address: _____
City, State, Zip: _____
Phone Number: _____

SUPERIOR COURT OF ARIZONA, COUNTY OF COCONINO

In the Matter of the Guardianship and/or
Conservatorship of:

(3) Case Number: _____

(2) _____
An Adult

**REPORT OF THE COURT-APPOINTED
INVESTIGATOR**

(4) I am the court-appointed investigator. I have no personal interest in this proceeding. I have conducted an investigation as required by statute. This report concerns:

- ☐ Appointing a guardian and/or conservator
☐ Removing a guardian and/or conservator
☐ Accepting a guardian and/or conservator's resignation
☐ Terminating guardianship and/or conservatorship

I reviewed the following documents:

I interviewed the following people:

Background

(5) The ward has lived in a ☐ private home ☐ boarding home ☐ nursing home ☐ other:
_____ for: _____

Before then the ward lived at:

From: _____ To: _____ Address: _____

(6) Symptoms of the Ward's Incapacity:

(7) The Guardian and/or Conservator's Relationship to the Ward: _____

(8) When the Ward Became Incapacitated: _____

(9) How the Ward's Incapacity is Being Treated:

(10) Prior Psychological Evaluations of the Ward:

Conducted By:	Date:	Major Findings:
NAME: _____	_____	_____
Title: _____	_____	_____
NAME: _____	_____	_____
Title: _____	_____	_____

Findings

(11) Incapacity prevents the ward from providing for the following on their own behalf:

<input type="checkbox"/> Food, clothing, and shelter	<input type="checkbox"/> Medical decisions
<input type="checkbox"/> Educational, social, and religious activities	<input type="checkbox"/> Financial decisions
Other: _____	

(12) How the Guardian and/or Conservator Plans to Meet the Ward's Needs:

(13) The ward holds the following opinion and understanding of their incapacity, the guardian and/or conservator, and the guardianship and/or conservatorship:

(14) Whether and How the Guardianship and/or Conservatorship is in the Ward's Best Interest:

(15) Whether the Guardian and/or Conservator is the Most Appropriate Person:

(16) Whether and How the Ward's Current and Proposed Place of Residence are in the Ward's Best Interest:

(17) How the Guardianship Could be Limited:

(18) Considerations on Suspending the Ward's Driver's License:

(19) Whether and How the Ward's Accounts Should be Restricted:

(20) **Financial**

The ward has an annual income of \$_____ with assets of \$_____

(21) **Medical**

The Ward's Diagnosis: _____

☐ It is progressive and incurable.

The Ward's Medications:

Purpose:

(22) Other Comments

(23) Date: _____

Investigator's Signature: _____